**Agenda Items for District Site Set-Up Meeting**

**November 27 & 28, 2018**

8:30 – 8:45 Re-Introductions and Objective Setting

8:45 –12:00 Discussion Surrounding the Elements Below

Questions to answer: What does it look like for us?

Who will manage the task?

How will it be managed over time?

12:00 – 1:00 Lunch - Unify Roadmap Overview

1:00 – 3:00 Work Session and Q & A

**Core Files**\* – The core files are required for site operation. There are five core files – Teacher, Course, School, Schedule and Student. There are few decisions around the first four, but the Student file contains many fields that are used for filtering and aggregation in the platform.

Student file with optional fields (including the customization of the moniker for those fields)

The standard core student file contains many optional fields such as SWD status (including by primary exceptionality), LEP status, and migrant status. If used, many of these become filter options to identify sub-groups of students. However, the filer security discussed below can be used to control the ability to control this. Only the economically-disadvantaged flag (ED, FARMs, Poverty, etc) flag can be specifically turned on or off from view at site-level.

**Roles**\* – Standard Roles: District Admin, District User, Principal, School Admin, and Teacher

The standard roles are set up by default and control the standard sets of users typical in a district site. These control the level of analysis allowed in the platform (district, school, and classroom). These further are leveraged to open menu options and grant permissions to the users by role. These are managed by scripted or manual files nightly or periodically.

**Custom Roles**\* – District Data Viewer, District Enhanced, School Users: Counselors, Coaches, and Others

Custom roles can be accommodated in the platform. These control the level of analysis allowed in the platform (district, school, and classroom). These would be managed as standard roles via a scripted or manual file nightly or periodically. One would generally choose to use these if the menu options that are selected for the standard roles do not match the desired menu options for another set of users with the same level of data access.

**Groups**† – Using Groups to manage Permissions and Menu Security options

Groups are used for two purposes:

- First, users in a group can be exposed to the same menu securities (options), which might be above the standard set given to the users’ roles.

- Second, users in a group can be granted permissions to an object (source, bank, rubric, test, or intervention) in the platform owing to their membership in the group.

Thus, groups can be set up in the platform when a subset of a role needs an additional menu security or when you will grant permissions to objects to a group of users.

Some standard groups are set up at site stand-up based on school membership.

**Menu Securities**† – Managing access to Menu options by Roles and Groups

Menu securities control the menu options that can be accessed by users in the platform. Access to a menu option is granted by role or by group. We turn on a master set of menu securities that are available to district admin, and then selected menu securities are made available to roles and groups.

**Sources and Banks**† – Storing, retrieving, and managing access to both secure and non-secure items

Items are stored in an item-banking framework that consists of sources of items that contain banks. Common set-ups include Subject → Courses, School → Grade → Course, Tier → Content → Grade, among many others. This is important to think about early, as items cannot be bulk copied or moved between banks.

**High-Stakes Admin**† – Enforcing limited access to tests, items and assessment results

If needed, we can enable a group that has access to any high-stakes elements within the platform. Various test-level settings can be applied to further limit access.

**Additional Files**\* – (A) Custom filter file and Area/Cluster files & (B) Holiday Schedule

1. Structurally sets up a hierarchy of schools within a cluster and/or area architecture. Custom user roles can be used to manage access at the Area level. This requires a nightly file that indicates the presence of a student in a cluster.
2. This file can be provided to enable the exclusion of holidays and weekends for test that are no closed class-by-class. This causes the tests to be only available during the school week, and time settings can be placed to limit access to the school day.

**Attendance File**\* – File containing attendance data for students

The attendance file provides data both for the attendance panel on MyUnify pages (if enabled) as well as becomes the source file for EWS flagging. We can report attendance in multiple ways, but it is the same for all schools in the district. A separate mapping file for codes is required.

**Discipline File**\* – File containing discipline data for students

The discipline file provides data both for the discipline panel on MyUnify pages (if enabled) as well as becomes the source file for EWS flagging. We can report discipline in multiple ways, but it is the same for all schools in the district. A separate mapping file for codes is required.

**Grades File**\* – File containing grades data for students

The grades file provides data both for the grades panel on MyUnify pages (if enabled) as well as becomes the source file for EWS flagging. Grades can be reported by multiple timeframes, and it is also in this file where exam grades will be reported.

**Filter Security**† – Managing access to filter on demographic and geographic elements

The demographic and geographic elements contained within student, school, schedule, teacher and course file in addition to any custom filters are elements on which users can filter views and results. Access to being able to filter is granted by filter security. Groups and roles are used to manage this access.

**Assessment Categories**† – Used as limiting filters and organizational tools as well as to control student access to test-level and item-level data in Student Portal

Several areas of the platform that display results or otherwise are linked to tests can be more readily navigated through the use of assessment categories. Moreover, the review of data can be filtered through this to review and report results. Importantly, the release of test data are controlled by the selecting assessment categories that can and cannot be viewed in the Student Portal.

**CTO (Course-Type Override) File**†\* – Matching courses to subjects

The CTO is how the platform matches courses in the district for releasing tests to the correct students, reviewing data by subjects, and filtering to a subset of courses. This will be initially set up by our support team and then the district can review and refine, if needed.

**Student Portal**†\* – Selecting elements to make available and navigating the release of item-level results and feedback to students

The Student Portal is semi-customizable in that the district can select what is available for viewing by students and what is not. This element must be specifically turned on for the district.

**Early-Warning Indicators** (EWS)\* – Business rules that flag against student academic, attendance and behavioral data sent by the district.

Once determined, a file layout of early-warning rules will be built by PM and the district. Common flags include grades, state test scores, local assessments, attendance, and discipline. These are captured from within other files, and only business rules need to be separately defined.

**External Measures**\* – An unlimited number of external academic assessment, other assessments, GPA, and external data measures can be populated into the BBCard.

Many follow standard layouts, while many others are unique to a district. A set of layout files is provided at site stand-up for the standard assessments. Other metrics can generally follow a typical layout, while nested data follow a specific layout.

As part of most external measures, performance-level color-banding guidance is provided by the district. Many reporting features rely on color-banding for most robust presentation. These should be provided at the submission of the files.

**Private Test Flag**\* – The “Private” flag can be made available to be turned off by teachers.

By default, all users with the role of Teacher will have their tests flagged as private, and neither the tests nor their results can be viewed by others. As part of the set-up, the ability to ‘uncheck’ the private flag can be made available to Teacher users. All other users’ tests will be flagged as not private. What this means –

If a test is marked private, then the test can only be administered to a teacher’s students, and the results of the test will only be visible to the teacher. If the test is not marked private, then the test will be visible in the Test Centers of all teachers in the district that match on the Course Subject and Grade Level assigned to the test. Note that this can be limited to just a campus or even just a few classes by selecting ‘Limit Test Center’ in the test creation administration panel. Careful training of teachers to use the ‘Limit Test Center’ function will be essential if a test is unchecked as private.

**Performance Bands†** – Creation of color-banded representations of performance levels

Performance bands can be set up at the district level, and teachers and others can be trained in applying those to assessments created in the platform. At the test level, users can apply custom performance bands to local assessments.

**Standards**\* **–** Academic standards have been loaded to the platform based on adopted standards at the state level.

We can also accommodate additional national, state or local standards that can be uploaded into the platform between 3 and 5 times per year. These will need to be provided in a standard format.

\* Handled by a ticket to set up, and files generally drop nightly for core, roles, EWS, Attendance, Grades, Custom filer and Area/Cluster files. All others, handled by ticket case-by-case for loading or performance.

†\* Handled by a ticket to setup, then managed through UI.

† Managed through UI.